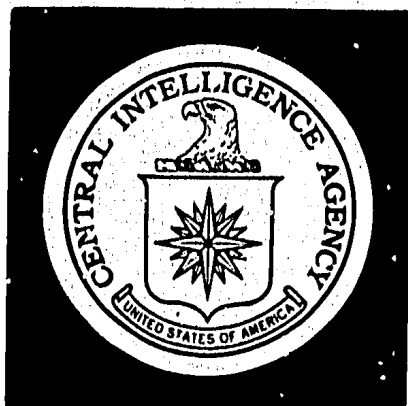


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DIRECTORATE OF  
INTELLIGENCE

# Intelligence Memorandum

*Shipping To North Vietnam During September 1970*

~~Secret~~

ER IM 70-156  
October 1970

Copy No. 62

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Foreword

All data in this memorandum are preliminary and subject to minor changes as additional information becomes available. Data for the preceding month and monthly averages presented in the tables have been adjusted to reflect corrections and additions. Weights of cargoes are expressed in metric tons. Because of rounding, components may not add to the totals shown.

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CENTRAL INTELLIGENCE AGENCY  
Directorate of Intelligence  
October 1970

INTELLIGENCE MEMORANDUM

Shipping To North Vietnam  
During September 1970

Highlights

After three months of decline, North Vietnamese seaborne imports rose in September to 136,000 tons. This figure, however, was 24,000 tons below the monthly average for the preceding eight months. Deliveries of petroleum, fertilizer, and general cargo all recorded significant gains in September, and foodstuff imports were up slightly. A Soviet ship delivered a small consignment to Haiphong that was probably military cargo.

Seaborne exports rose to 49,000 tons, the highest level since February, as a result of a sharp increase in coal shipments and the resumption of apatite exports after a month's lull. About one-half of the total export volume went to Japan.

Despite an increase in arrivals in September to 39, there was no congestion in Haiphong during most of the month. Construction activity continued along the new extension of Haiphong's Chamber of Commerce Wharves. Work also proceeded on the new petroleum pipeline extending westward from Va Chai, but its ultimate destination cannot yet be determined.

*Note: This memorandum was produced solely by CIA. It was prepared by the Office of Economic Research and information on ship arrivals was coordinated with the Naval Intelligence Command.*

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Seaborne trade was slightly greater during the first nine months of 1970 than in the equivalent period in 1969, but fell short of the record level in 1968. Imports were slightly higher despite an 13% drop in foodstuff deliveries. Imports from the USSR increased 43% above those for the comparable period of 1969, and imports from China decreased 34%. Total exports declined slightly, pulled down by a 34% drop in coal shipments.

Seaborne Imports

1. North Vietnam's seaborne imports rose 38% in September to 136,000 tons, about 24,000 tons below the monthly average for January-August (see Tables 1 and 2). Increased Soviet arrivals brought imports from the USSR to 83,100 tons, more than 50% above their level in August (see Figure 1). Deliveries from Communist China fell for the fifth consecutive month -- to 21,700 tons.

2. After a void in tanker arrivals in August, petroleum deliveries jumped in September to 18,400 tons, well short of both the 35,000 tons requested by North Vietnam for September and the January-August monthly average of about 30,900 tons. Petroleum imports should rise further in October as the North Vietnamese have requested that the USSR ship 38,600 tons during that month.

3. Imports of fertilizer rose to 15,100 tons -- 6,500 tons of ammonium sulfate from the USSR, 5,900 tons of urea from Japan, and 2,700 tons of unspecified fertilizer from North Korea. Foodstuff imports, bolstered by a delivery of 8,700 tons of Cuban sugar,\* increased slightly to 46,300 tons. The USSR accounted for 26,500 tons and China for 11,000 tons.

4. Deliveries of general and miscellaneous cargo rose 40% to 56,300 tons, slightly above the

\* *There have been three other deliveries of Cuban sugar in 1970 -- in February, May, and July.*

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monthly average delivered thus far in 1970. Nearly 11,000 tons of metal products from Soviet and East European ports were offloaded in Haiphong during the month. Machinery and equipment deliveries, which amounted to about 5,000 tons, included 1,700 tons of cranes. About 2,700 tons of gypsum arrived from Communist China, probably for the Haiphong cement plant. One Soviet ship, the *Simferopol*, delivered a small consignment which probably consisted of Soviet military-related cargo.

Exports

5. Seaborne exports rose to 49,000 tons, almost three-fourths above the level in August (see Tables 3 and 4). Coal shipments increased to 29,400 tons, their highest level since February. All of the coal went to Japan except for a 4,500-ton shipment loaded on the Polish ship *Kochanowski*, which, as other Polish ships did in July and August, will probably carry it to Europe after a call at Singapore. After a month's interruption, apatite exports resumed with a 4,000-ton shipment to Communist China.

Arrivals

6. Thirty-nine ships arrived in North Vietnam from foreign ports in September, ten more than in August (see Table 5). Nearly all of the upswing resulted from an increase in Soviet arrivals.

7. The first East German ship to call at North Vietnam since September 1969, the *Frieden*, arrived on a tramp voyage from Rostock and Gdynia. On a few occasions, Polish ships have carried East German transshipment cargo during the past year, and this voyage by the *Frieden* may have resulted from difficulties in scheduling a Polish ship to carry the cargo.

Activity at Haiphong

8. The first port of call for most of the arrivals was Haiphong. Two ships, however, sailed directly to Hon Gai, one with 2,500 tons of unidentified cargo and the other in ballast to load coal. Seven other ships\* moved to Hon Gai or Cam

\* Three of these ships had arrived in Haiphong in August.

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Pha during the month to load coal after discharging cargo at Haiphong.

9. Despite increased arrivals at Haiphong, there was no congestion throughout September. The average number of ships in port per day fell from 13 to 11, the lowest it has been in 1970, and the average layover time declined from 19 to 13 days (see Figure 2).

10. There is new evidence of continuing progress in construction of the new extension to the Chamber of Commerce Wharves [redacted]. The new wharf will probably cover the entire area previously occupied by the Hospital Wharf (remnants of which remain) and may extend beyond. The fourth portal crane to be installed on the wharf extension was apparently operational. Additional cranes may be scheduled for installation on the new wharf. In July a Soviet radiobroadcast stated that a crane for Haiphong had been completed at the Kirov hoisting and transport equipment plant in Leningrad, [redacted]

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#### Construction Activity Along the New Pipeline

11. Construction activity along the new petroleum pipeline between Va Chai (a small port across the Cua Lac Channel from Hon Gai) and points west continued during the month. Stacks of assembled pipe sections lie about the Va Chai dock area, possibly for use in a pier for discharging petroleum tankers or lighters [redacted]. A small building is being constructed nearby. The eventual western terminus of the line, which could be Hanoi or Haiphong, cannot yet be determined. There is no evidence of construction activity along Route 10 between the pipeline and Haiphong.

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#### Seaborne Trade and Shipping During January-September 1970

12. North Vietnamese seaborne trade during the first nine months of 1970 increased only 1% above the equivalent period of 1969 and was about 10% below the record level achieved in January-September 1968, as shown in the following tabulation:



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	Thousand Metric Tons		
	<u>Jan-Sep 1970</u>	<u>Jan-Sep 1969</u>	<u>Jan-Sep 1968</u>
Total seaborne trade	1,785	1,768	1,976
Imports	1,415	1,383	1,474
Exports	370	385	502

13. Gains in fertilizer and petroleum imports were largely nullified by an 18% drop in deliveries of foodstuffs. Fertilizer imports rose by 43%, with most of the increase occurring in ammonium sulfate consignments from Soviet Black Sea ports. Stepped-up imports of fertilizer, needed to increase the yields of traditional rice varieties, may also be related to growing North Vietnamese use of so-called miracle rice, which requires exceptional amounts of nitrogenous fertilizer for its cultivation. According to Hanoi radio, North Vietnam plans to increase the amount of land devoted to the new rice.

14. Comparisons of import levels during the first three quarters are somewhat vitiated by an 82% increase in unidentified cargo from 125,400 tons in 1969 to 228,700 tons in 1970. About 126,000 tons of the unidentified cargo were delivered from Communist China; the unidentified cargo from that origin during January-September 1969 was only 33,000 tons. However, total deliveries of unidentified cargo and those from Communist China were not much greater in 1970 than in 1968. Unidentified cargoes made up 43% of the deliveries from Communist China in the first three quarters of 1970, while only 10% of the deliveries from other Communist countries were unidentified. The reason for the great increase in the unidentified cargo from China is unclear.

15. The USSR supplied nearly 900,000 tons of cargo during the first nine months of 1970, more than 270,000 tons above last year (see Table 6). Imports from North Korea nearly doubled (to 25,100 tons). Deliveries from Communist China, Eastern Europe, and the Free World, however, fell by about 40% -- to 293,700 tons, 103,200 tons, and 53,400 tons, respectively.

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16. Exports during the first nine months of 1970 were off only slightly despite a 34% decline in coal exports (see Table 7). The drop in coal shipments was largely compensated for by increased exports of apatite, cement, and general cargo. A total of 21,000 tons of rice, an important hard currency earner for North Vietnam, was exported through September, compared with 14,600 tons during the similar period last year.

17. Despite increased seaborne trade, foreign-flag arrivals fell for the second consecutive year -- to 330 ships, as shown in the following tabulation:

	<u>Jan-Sep 1970</u>	<u>Jan-Sep 1969</u>	<u>Jan-Sep 1968</u>
Total	330 <u>a/</u>	342 <u>a/</u>	377 <u>a/</u>
Communist	<u>278</u>	<u>263</u>	<u>265</u>
Soviet	201	169	161
East European	21	29	22
Chinese	49	61	78
Cuban	7	4	4
Free World	<u>52</u>	<u>79</u>	<u>112</u>

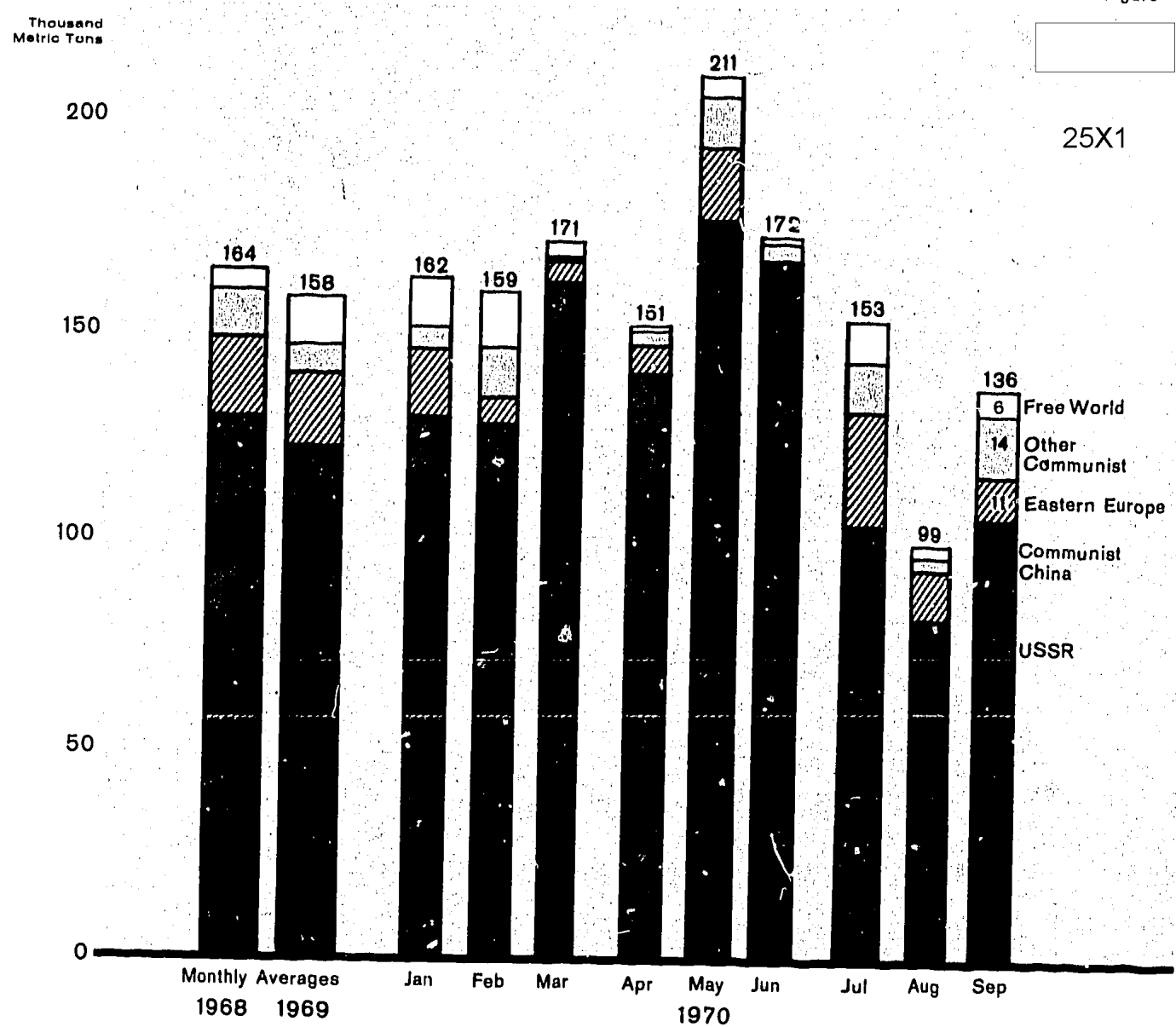
*a. Excluding North Vietnamese arrivals from foreign ports.*

Calls by Soviet vessels reached 201, a record high for a January-September period, and Communist Chinese calls dropped to 49, a record low.

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NORTH VIETNAM:  
Seaborne Imports by Origin

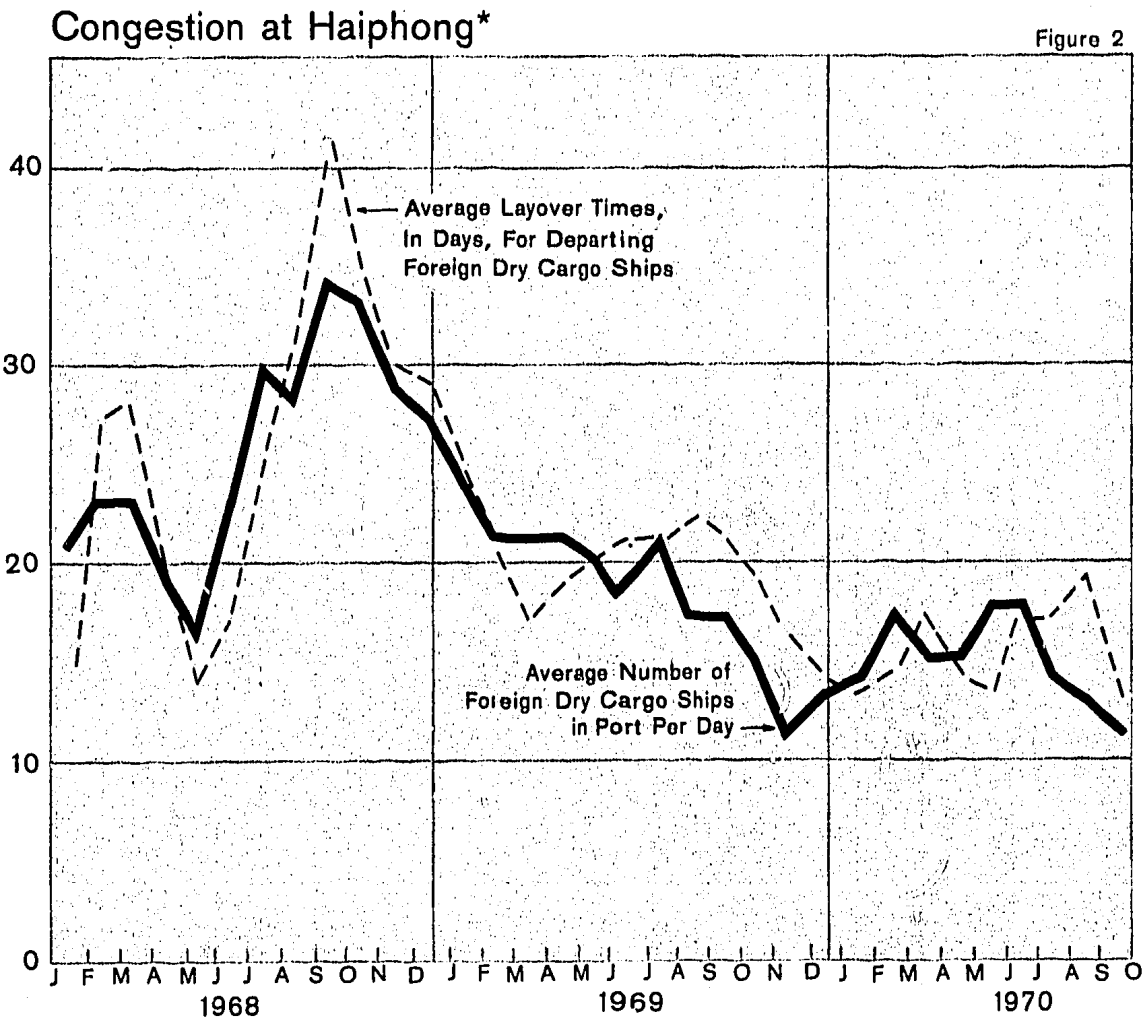
Figure 1



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\*Tankers are excluded from these averages because they do not compete with dry cargo ships for the limited berthing space in Haiphong. The average layover time for departing dry cargo ships is compiled by averaging layover times (including both the day of arrival and the day of departure) of all foreign dry cargo ships leaving Haiphong in the month.

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Table 1

Seaborne Imports, by Origin and Commodity  
1970

Origin	Thousand Metric Tons									
	Foodstuffs		Fertilizer		Petroleum		General and Miscellaneous		Total	
	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug
<i>Total</i>	<i>46.3</i>	<i>57.9</i>	<i>15.1</i>	<i>16.3</i>	<i>18.4</i>	<i>30.0</i>	<i>56.3</i>	<i>a/ 54.9</i>	<i>136.1</i>	<i>159.9</i>
Communist	46.3	57.9	9.2	13.7	18.4	30.9	56.1	51.7	129.9	154.0
USSR	26.5	37.5	6.5	11.1	18.4	30.5	31.7	22.9	83.1	102.0
Eastern Europe	--	0.9	--	1.5	--	--	11.0	9.2	11.0	11.5
China	11.0	15.0	--	--	--	0.4	10.7	18.6	21.7	34.0
North Korea	0.1	0.5	2.7	1.2	--	--	2.7	0.8	5.4	2.5
Cuba	8.7	3.9	--	--	--	--	--	--	8.7	3.9
Free World	0	0.1	5.9	2.6	0	0	0.2	3.2	6.1	5.9
Japan	--	--	5.9	2.6	--	--	0.2	0.2	6.1	2.8
Cambodia	--	--	--	--	--	--	--	1.7	--	1.7
Other	--	0.1	--	--	--	--	--	1.2	--	1.4

a. Including 28,800 tons of unidentified cargo, 10,800 tons of metal products, 4,900 tons of machinery, 1,700 tons of vehicles, and 10,100 tons of other cargo.

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Table 2

Seaborne Imports, by Flag and Commodity a/  
1970

Thousand Metric Tons							
Flag	September				Total	Aug	Monthly Average Jan-Aug
	Food- stuffs	Ferti- lizer	Petro- leum	General and Miscel- laneous			
<i>Total</i>	46.3	15.1	18.4	56.3	136.1	98.9	159.9
Communist	46.3	15.1	18.4	45.6	125.4	87.9	135.0
Soviet	26.5	12.4	18.4	32.0	89.3	58.8	104.8
East European	--	2.7	--	8.5	11.2	11.0	11.5
Chinese	11.0	--	--	5.2	16.1	18.0	14.3
Cuban	8.7	--	--	--	8.7	--	4.0
North Vietnamese	--	--	--	--	--	0.1	0.4
Free World	0	0	0	10.7	10.7	11.0	24.8

*a. Identified imports include some estimates of bulk cargoes using methods which have proved to be highly reliable.*

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Table 3

Seaborne Exports, by Destination and Commodity  
1970

Thousand Metric Tons

Destination	Coal		Cement		Apatite		Rice		General and Miscellaneous		Total	
	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug	Sep	Monthly Average Jan-Aug
Total	22.4	23.7	0.3	1.0	4.0	8.2	1.3	2.5	13.7	4.8	49.3	40.1
Communist	0	10.0	0	0	4.0	8.1	0	0	8.6	2.1	12.6	20.1
USSR	--	--	--	--	--	--	--	--	2.0	Negl.	2.0	Negl.
Eastern Europe	--	0.6	--	--	--	--	--	--	0.5	0.8	0.5	1.3
China	--	8.8	--	--	4.0	2.8	--	--	6.0	1.1	10.1	12.6
North Korea	--	--	--	--	--	5.3	--	--	--	0.1	--	5.4
Cuba	--	0.6	--	--	--	--	--	--	0.1	0.1	0.1	0.7
Free World	22.4	13.7	0.9	1.0	0	0.1	1.3	2.5	5.1	2.8	36.7	20.1
Japan	24.8	12.5	--	--	--	Negl.	--	--	Negl.	0.3	24.8	12.8
Cambodia	--	--	--	--	--	--	--	--	--	0.2	--	0.2
Other	4.5	1.3	0.9	1.0	--	0.1	1.3	2.5	5.1	2.2	11.8	7.0

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Table 4  
Seaborne Exports, by Flag and Commodity a/  
1970

Flag	September					Thousand Metric Tons		
	Coal	Cement	Apatite	Rice	General and Miscel- laneous	Total	August	Monthly Average Jan-Aug
Total	32.4	0.8	4.0	1.3	13.7	49.3	23.8	40.1
Communist	29.9	0.9	4.0	1.3	12.4	39.5	28.8	38.5
Soviet	11.3	--	--	--	5.8	17.0	7.7	18.6
East European	4.5	--	--	1.3	1.1	6.9	7.8	3.4
Chinese	--	--	4.0	--	4.7	8.8	13.0	12.7
Cuban	5.1	--	--	--	0.1	5.2	0.1	1.3
North Vietnamese	--	0.9	--	--	0.7	1.6	1.3	2.5
Free World	2.5	0	0	0	1.3	9.8	0	1.6

a. Identified reports include some estimates of bulk cargoes using methods which have proved to be highly reliable.

**Table 5**  
**Ship Arrivals, by Type, Flag, and Origin**  
**1970**

	September							
	Origins							
	USSR							
Type/Flag	Black Sea	Far East	Communist China	Other Communist	Free World	Total	August	Monthly Average Jan-Aug
Total	4	13	5	3	9	39	29	41.3
Dry cargo	4	9	5	3	9	35	29	36.2
Tanker	--	4	--	--	--	4	--	5.0
Communist	4	13	5	4	9	35	26	35.2
Soviet	4	13	--	--	4	21	13	22.5
East European	--	--	--	2	--	2	2	2.4
Bulgarian	--	--	--	--	--	--	1	0.5
East German	--	--	--	1	--	1	--	--
Polish	--	--	--	1	--	1	1	1.9
Chinese	--	--	5	1	--	6	5	5.4
Cuban	--	--	--	1	--	1	1	0.8
North Vietnamese	--	--	--	--	5	5	5	4.2
Free World	--	--	--	4	--	4	3	6.0
British	--	--	--	4	--	4	2	4.0
Somalian	--	--	--	--	--	--	--	1.6
Other	--	--	--	--	--	--	1 a/	0.4 b/

a. Singapore.

b. Including one each under the Egyptian, Maltese, and Singaporean flags.

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Table 7  
North Vietnamese Seaborne Exports, by Commodity

Commodity	Thousand Metric Tons		
	Jan-Sep 1970	Jan-Sep 1969	Jan-Sep 1968
Total	570.4	335.0	502.3
Coal	218.8	333.2	453.8
Apatite	69.5	1.0	-
Cement	8.8	5.2	-
Rice	21.1	14.6	-
Pig Iron	-	-	-
General and miscellaneous	52.3	31.0	48.5

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